



ACR CLIENT ENTRY USER GUIDE

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Acute Care Reporting (ACR) is a data platform designed to collect admission and discharge data for behavioral health (BH) clients at acute care hospitals. The system is designed to facilitate data collection of addictions and mental health client treatment data from all publicly funded behavioral health providers across Oregon. This system is designed for the use of entities/facilities in the behavioral health field who handle acute care clients. ACR will collect status (demographic, etc.) and non-Medicaid service data. This data provides information on services and events within the treatment episode. Collecting this data allows Oregon Health Authority (OHA) to focus on reporting accurate admission and discharge data for behavioral health clients.

By implementing and collecting data through an acute care reporting system, OHA will acquire information necessary to fulfill its obligation to those entities to which it is accountable, along with ensuring the ability to track metrics that align with broader Oregon Health Authority, Health System Transformation efforts.

About this guide

This guide provides the user with clear instructions for navigating the system, requirements for successful data collection, and general tips for data submission. Information contained herein acts as a reference manual for users of the ACR system.

It gives instructions on how to:

- Search for existing clients
- Create and admit new clients
- Add admission and discharge data
- Add diagnoses to hospital records
- Record and update status information for clients
- Report system issues

Acronyms

OHA	Oregon Health Authority		
ACR	Acute Care Reporting		
OPRCS	Oregon Patient/Resident Care System		
ICD 9	International Classification of Diseases, Ninth Revision		
ICD 10	International Classification of Diseases, Tenth Revision		
OR Number	Oregon State Employee Number		
P Number	Provider Number		
AA	Access Agreement		
OIS	Office of Information Services		
UNK	Unknown		
REALD	Race, Ethnicity, Language, and Disability		
PSRB	Psychiatric Security Review Board		

Training in ACR

By request OHA will host online trainings for ACR. New users will be set up with a login and password once they have received their new P-number.

New users will be set up with a login and password once they have received their new P-number. All online or hybrid trainings will allow users to learn and practice using the ACR system in the training environment. None of the data entered will be saved at the end of the training session, allowing users to practice in a simulated environment that will not affect live data.

Login access will be sent out a few days prior to the in-person training so that users can set up their passwords and familiarize themselves with the training environment in advance.

How to enroll

To enroll in online, contact Compass.Support@odhsoha.oregon.gov for more information about upcoming training opportunities and submit an emailed request to participate in the next trainings. Please provide your P-number and the address of your facility in the email to register for the class. A confirmation email will be sent to you once you are registered for the training. Instructions, links, guides, and location information will be sent to you prior to the training date.

Questions:

If you have questions about the class or how to enroll, contact Compass.Support@odhsoha.oregon.gov for assistance.

Client Entry Conventions

CS-ACR is designed to be intuitive and user friendly. Several standard conventions are listed below to help orient new users to the layout and methodologies used in this new system.

General Conventions

Browsers	Nearly all browsers can be used and are supported when working within ACR.		
Data Field Entry Order	Always left to right, top to bottom		
Drop-down boxes	Allows users to select options from pre-made lists in certain fields. Users can type in the first values to populate valid entries.		
Searchable Fields	Enter first few values to populate valid entries.		
Free Text Fields	Enter information as requested.		
User Header	All pages within ACR will show user identifying information at the top while the user is logged in, such as name and user role.		
Home Facility	This information will display on the left side panel once user roles and facility have been assigned.		
Recent Views	The left side panel will display the recently viewed pages within the session for easier access to pages.		
Informational Updates	These updates will appear at the top or bottom of the webpage to inform users that an action was completed successfully. Messages will appear in a grey box with an informational icon next to them. Users must select the save button after completing all fields.		
Error Messages	Warning and error messages will be in red font wither at the top of the screen, in a pop-up box, or attached to the field where the error occurs. Additionally, required field will appear red if an error message is present. Once correct, error message will disappear after saving.		
Required Fields	Fields that are required for data submissions in ACR will have a red asterisk next to them. If a required field is left blank, once the user tries to save, an error message will appear, and the required field will turn red. Once corrected, error messages will disappear after saving.		
Optional Fields	Fields that are not marked by a red asterisk are not required fields. Users are highly encouraged to fill in as many of these fields as possible, to provide the most accurate data and quality client care.		

Special Characters	Free text fields will accept the following special characters: $! \sim ``, $ ^*() + = ?/[]{}$	
Data Fields	Key in the data using the format MM/DD/YYYY in all date fields. Some date fields can be chosen by calendar icon.	
Save Button	Clicking on the Save button will save all data in that record, as long as all required fields have been filled.	
Close/Back Button	Use the Close/Back button to return to the previous screen.	
Advanced Button	The Advanced button will pull up additional fields to enter more patient data. To return to the simplified version of the webform select the Basic button.	
Clear Button	To clear out the search fields, select the Clear button.	
Search Button	Select the Search button to enter your query and pull up matching results.	



Important Note: Do not hit the Enter/Return button on the keyboard to save or enter a query. This will cause an error and close out the screen.

Accessing ACR

OHA will administer ACR access through individual partner numbers ("P-numbers"). All P-numbers issued by OHA are for the sole use of the person to whom it was authorized. All contributors within ACR must have a unique valid partner number (P-number) assigned to them.

- New users will need to contact COMPASS support to get their own P-number.
- When a user leaves their organization, the organization will contact COMPASS Support to have their user's P-number deactivated.
- Most web browsers should run ACR with no problems. For best user experience, Firefox and Internet Explorer are preferred. Safari and Chrome are not preferred browsers.

How to request access

To submit an access request within ACR, send an email to Compass.Support@odhsoha.oregon.gov with the following information:

- Legal name First, MI, Last
- P-number (for current users)
- Name of organization
- Mailing address Street, City, State, ZIP code
- Job title and phone number
- Email address of user
- Requested user role (browser or facility contributor)
- Browser: Has viewing privileges, but cannot edit client records
- Facility Contributor: Can view and edit client records

Temporary Passwords

After OHA resets or issues a new P-numbers, users will need to change the temporary password provided to them. Temporary passwords expire after seven days. If the password has not been changed, the user's P-number will be locked on the eighth day.

Password Requirements

Passwords must have at least:

- Ten characters
- One uppercase letter (A-Z)
- One lowercase letter (a-z)
- One number (0-9)
- One special character

Password Restrictions:

Passwords cannot:

- Contain any spaces
- o Include the user's name, any proper names, or words found in the dictionary
- Be too similar to previous passwords

Change passwords every 60 days

P-number passwords need to be changed every 60 days or users will be locked out of the system. For regular password resets every 60 days, please use this Citrix link: https://lclick.dhsoha.oregon.gov/vpn/index.html.

Unlocking P numbers

If a P-number is locked, the user must contact the Service Desk at 503-945-5623 and select option 1 for a password reset.

Password resets do not take effect automatically. Please wait at least fifteen minutes before logging in after requesting a password reset.

Requesting changes to P numbers

Email compass.support@dhsoha.state.or.us to deactivate a P-number, request a new P-number, or modify roles for an existing P-number.

- Provide the following information:
- Legal name First, MI, Last
- P-number (for existing users)
- Name of organization
- Mailing address Street, City, State, ZIP code
- Job title and phone number

- o Email address of the user
- Requested user role (browser or facility contributor)



Important Reminder: All P numbers issued by OHA are for the sole use of the person to whom it was authorized.

Login Page

To log into the system, users must send in a request to Compass.Support@odhsoha.oregon.govalong with their user roles. Once they have been setup, they will receive an informational email with training opportunities and the access link. The user must be set up with their facility in advance if they are facility contributors.

If you have trouble logging in, you may need to set up your password or request access if you are a new user.

User Roles

PG Net has several different user roles for varying levels of access to the system. Not all users will have the same functionality. Some of the screenshots or pages in this reference guide will not apply or be visible to some of the users roles, depending on the level of access.

Browsers

Users with this role will be limited to view-only access. They will be able to view client data but will not be able to edit client data. Browsers may be attached to a facility or they may not be. They will not have edit rights to any of the webforms. This role is primarily intended for those that need to verify client data. Browsers can view entity, facility, person, and client information.

Facility Contributors

Users with this role will be able to view, add, and edit client data. Contributors are tied to a home facility and can view, add, and edit client data for the clients entered into their facility. Users in this role will be able to edit person and client records when admitting them but will not be able to edit client information of clients admitted to other facilities.

Data Managers

The data manager role is typically reserved for OHA users who will need to view and edit client records. This includes making data corrections, record merges and unmerges, deleting records, and compiling reports.

System Administrators

The system administrator role is reserved for the OHA user who is in charge of maintaining the system. They assign user roles and facilities for all users. System administrators are responsible for the oversight of automatic report distribution and data management.

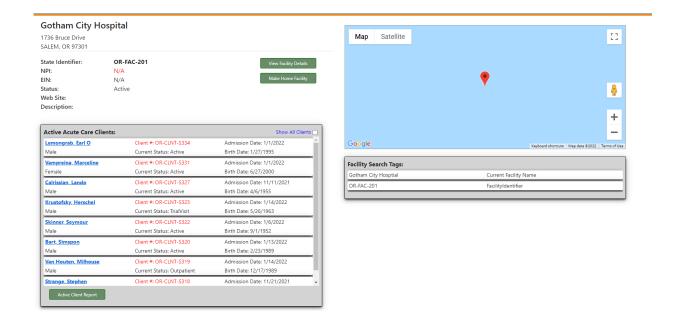
Home Page Introduction

The first page a new user will see is the home page, which includes a link to their home facility, client information, reporting, and the help resources.



Home Facility

Each user will belong to their home facility at the initial login as user login credentials are tied to the user's home facility. From the home facility page, the user will have access to all active clients currently involved in treatment.



Client Search or Client Look-Up

Click the Client Information button on the left side menu. This will bring up the Person/Client search form. After entering your query information, press the Search button.

Searchable fields:

Perform a search by entering information into the following fields:

- First Name
- Last Name
- Identifier (such as Patient Number)
- Birth Date

To the right of First Name, Last Name and Identifier are drop-down fields to further specify your search parameters. Use these fields to narrow down your search results. These options for performing queries are:

- Includes
- Begins With
- Ends With
- Exact Match

Client/Person Search Last Name Includes First Name Includes Identifier Includes Birth Date mm/dd/yyyy Search Clear Client/Person Search Results: O Person Found

For Existing Client records:

If a client name appears below in the search results field, click on the name of the client to open the client record.

If the search does not yield any results check the information to verify no errors were made when entering the query. To clear the results and search for a new client or enter in new information into the search fields, select the Clear button. The CEM Home button will return the user to the main homepage for CS-ACR.

Hints for better search results:

- The Clear button will reset the search form.
- Always search for a client by using the first letter(s) of their first or last name or their identification numbers. The search form does not allow searching for parts of names or identification numbers other than beginning letter or numbers and does not allow wildcards (*).
- Below the main menu on the left you will be able to see previous records you have recently selected.
- It is possible to still run a search with only a partial patient number in the Identifier section.
- Birthdate must be filled out with the full month, day and year in the appropriate format (mm/dd/yyyy) to be able to run a search guery that way.
- For a list of all clients in a specific facility, select the desired facility from the dropdown list and click Search.
- Clients who have changed their names should still appear in the search results. Check the information
 of the search results to be certain the client is not already in the system under a different name.

Aliases and multiple records:

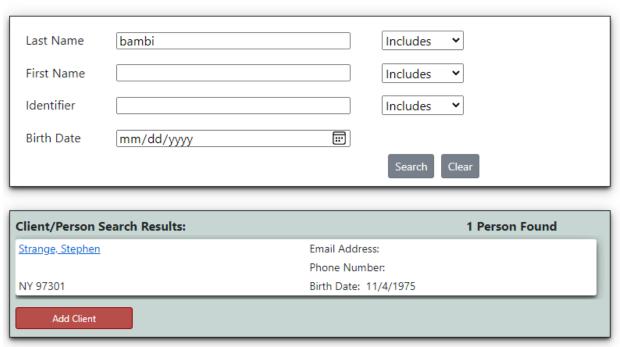
Because names and other personal information may change, it is possible that client records might already exist under a different alias. Below are some steps to take to verify the information for patients with multiple aliases.

- 1. Check the social security number (SSN) of the patient records.
- 2. Check the birthdate.
- 3. Verify the last name at birth.

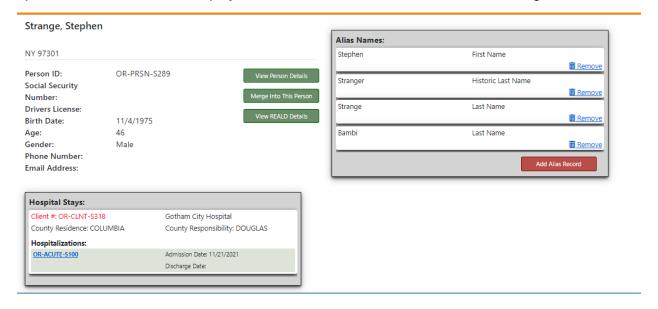
To check a client record, click on the name in the search results.

Alias information will appear on the right side of the screen under Supplementary Data in the Alias Names box. The alias box will include all available information for that person. In the example below, searching for the name "Bambi" will bring up an existing record.

Client/Person Search



Select the name "Strange, Stephen" to check and see if the client is that same person as "Bambi." This will open the client record and display the current information for that client, including all alias information.



Under the Supplementary Data section one of the Alias Names that appears is the name "Bambi." This indicates that the client's name may have changed, but the two names belong to the same person.

When entering in new client information, complete as many of the optional fields as possible. This will help create and maintain accurate client records and create more alias information to make searching for client records easier.

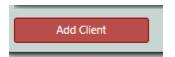
If a client's information matches another existing client record, an error message will appear prior to allowing the user to save the new client record.

Person Information Page

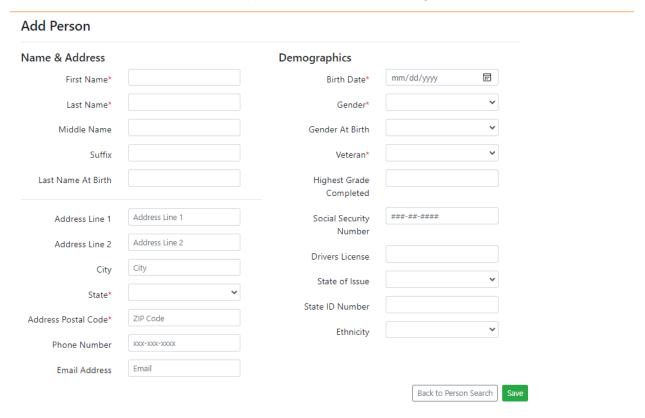
Creating a new client record:

Prior to creating a new client record, use the search features with the known information about the client to be sure the client is not already in the system. Check under different aliases or alternative spellings to gather the most accurate search results.

After performing the initial search for the client without a positive match, scroll to the bottom of the search results box and select Add New Client.



The Add New Client button will not appear without first searching for the client within the search form.



Any Field with a red asterisk is a required field.

When all fields are complete, click Save.

Race, Ethnicity, Language, and Disability (REALD)

Race, Ethnicity, Language, and Disability (REALD)



These questions are optional and your answers are confidential. We would like you to tell us your race, ethnicity, language and disability background so that we can find and address health and service differences.

In 2020, the Oregon legislature passed a law that requires health care providers to collect REALD (Race, Ethnicity, Language, and Disability) information at health care visits related to COVID-19 and share this information with OHA. This requirement helps the government understand more about the disparities in health care and the different groups impacted, and what may be done to address these disparities when addressing issues related to behavioral health treatment. For further questions about REALD reporting requirements for providers, visit: https://www.oregon.gov/oha/OEI/Pages/REALD-Providers.aspx or reach out to us by contacting Compass.Support@odhsoha.oregon.gov. PDF copies of the forms are available in multiple languages and formats for accessibility purposes.

Some fields within the REALD record address alternative formats for completing health information. Alternative materials in multiple languages and formats for collecting REALD information are available on the website link: https://www.oregon.gov/oha/OEI/Pages/REALD-Providers.aspx.

Race and Ethnicity Summary

Clients should complete the information with as much detail as possible. Although clients may refuse to participate, providers are still expected to report on all responses, even those of non-participation. It is possible for clients to enter more than one identifier for their race or ethnicity. All entries should reflect the individual and how they identify themselves. Response options are available for those who wish not to participate at this time. Providers may not provide entries based off of assumptions of the client.

In this section, clients can choose to provide a preference for their race and ethnicity identifiers. Multiple selection options and blank fill options are available. Use the check box and the arrows within the box at the bottom of the section to reorder or set a primary race or ethnicity to reflect how the client identifies.

Language Summary

The Language summary section offers a wide range of options to choose from. Providers should be sure to note any particular requests for accommodation from these fields, as some client may require alternative materials or translation services.

All fields should be completed as much as possible. Like the other sections, there are

Disability and Supplementary Information Summary

This section pertains to health and service differences among people with and without functional difficulties. Not all questions may pertain to all individuals. As with the other sections, this part is optional, but collecting the information is valuable for assessing varying needs and disparities in healthcare.

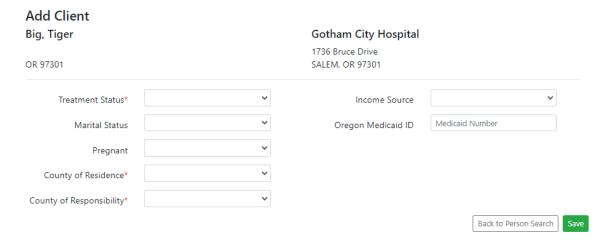
Several of the questions may reveal the need for alternative materials or translation services. Clients may require additional support to assist with their treatment plans.

Once all the information has been entered, select "Save" at the bottom to allow for any changes to be added or confirmed to the record of REALD information. Once the information has been saved, use the "Back to Person Summary" button to return to the previous screen.

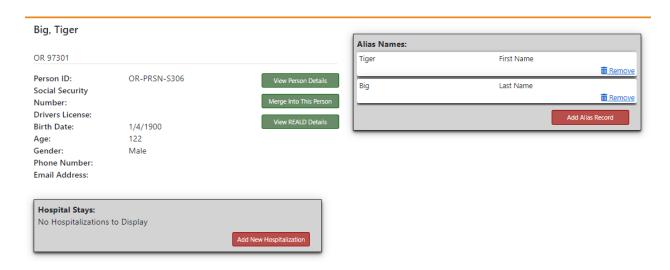
For more information about REALD or to find resources to help aid in health care discussions, visit: https://www.oregon.gov/oha/OEI/Pages/REALD.aspx.

Add Client to facility

- Contributors will have their home facility automatically assigned at login. Contributors will only be able
 to admit and discharge clients from their home facility.
- Clients must have a person record before they can be added to the system. Use the Client Search to
 pull up existing persons records. If there is no person file available that matches the information for the
 person that needs to be admitted, create a new record by following the Create New Client procedure
 listed below.



- Fields with an asterisk are required
- The client entry form will pre-populate the Client Identifier, Link to Person, and Link to Facility fields.
- Complete the remaining fields: County of Residence, County of Responsibility, Medicaid Recipient Number, Treatment Status, Marital Status, Income Source, and Pregnancy.
- If a client is male, please select the Not Applicable option in the Pregnancy field.
- Clicking save will create a person record tied to your facility



Updating an existing client record

Certain fields will be locked for editing to maintain unique system identifiers to prevent duplicate records from being created. The entries in these locked fields will be auto-generated by the system. These locked fields cannot be edited by users but will still be visible on the Client Entry Form. Once the client record exists and has been saved the following fields will be locked for editing:

- Client Identifier
- Link to Person
- Link to Facility

If information in a locked field needs to be edited, contact the site administrator for assistance (Compass.Support@odhsoha.oregon.gov).

Editable fields:

Some fields within the client record are editable after they are saved:

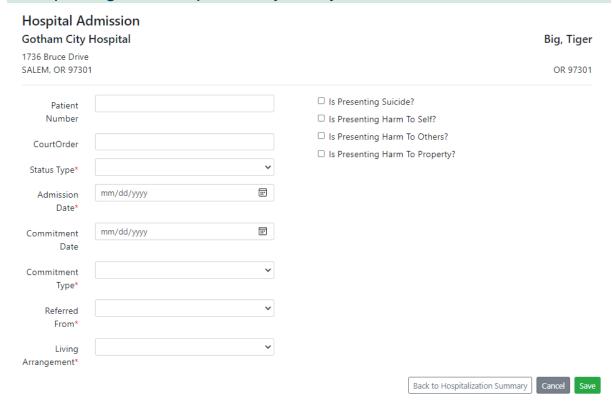
- First Name
- Last Name
- Middle Name
- Birth Date
- Death Date
- Social Security Number
- Driver's License
- State of Issue
- Last Name at Birth
- Gender
- Gender at Birth
- Veteran
- Address
- Address Validation Type
- Last Name at Birth
- Highest Grade Completed

- Ethnicity
- Record Source ID
- Record Source Name
- Security Level
- Last Linked By
- Last Linked Date

Admitting a Client

Contributors will have their home facility automatically assigned at login. Contributors will
only be able to admit and discharge clients from their home facility.

Completing the Hospital Stay Entry Form



Complete the following fields:

- Patient Number
- Hospitalization Status Type: Active, Outpatient Watch, On Trial Visit, Discharged
- Admission date
- Commitment Date
- Commitment Type
- County of Commitment
- Presenting Suicide
- Presenting Harm to Self
- Presenting Harm to Others
- Presenting Harm to Property

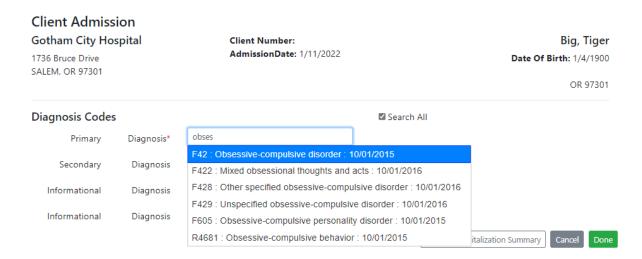
When all fields have been completed, click the Save button at the bottom of the screen. A message will appear when the information has been saved.

The client will now have a hospital admission record on file.

Client Admission				
Gotham City Hospital 1736 Bruce Drive SALEM, OR 97301		Client Number: AdmissionDate: 1/11/2022	Big, Tiger Date Of Birth: 1/4/1900	
			OR 97301	
iagnosis Code	s	☐ Search All		
Primary	Diagnosis*			
Secondary	Diagnosis			
Informational	Diagnosis			
Informational	Diagnosis			

The admission diagnosis should be completed shortly after admission. This diagnosis form is used to catalogue the diagnoses at the time of admittance.

Begin typing in the diagnosis. For instance, if the client has been diagnosed with Obsessive Compulsive Personality Disorder, begin typing in the word "Obsessive" and the diagnosis code options with the word "obsessive" in them will appear.



Select the diagnosis that best matches the diagnosis. Note that CS-ACR uses ICD 10 diagnostic codes as opposed to ICD 9 codes. The date in the Diagnosis Code options marks when the diagnostic code was created in the system.

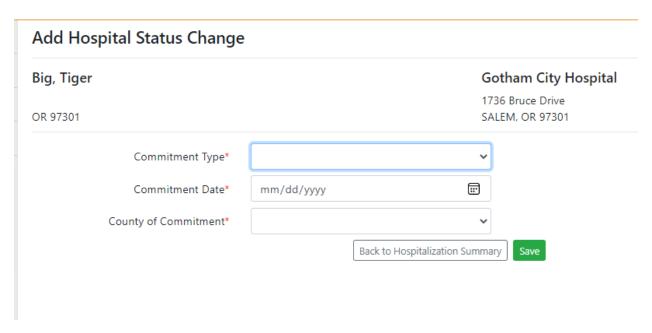
The Diagnosis Date field should be the date when the original diagnosis was made. Complete the diagnosis date in the MM/DD/YYYY format. Click Save. A message will appear telling the user that the diagnosis information has been saved.

Adding Status Update:

Over the course of treatment, a client's commitment status may change. To add a commitment status update, click on the Add Status Update button.



This will pull up the Commitment Status Change panel.



Select the Commitment Type from the drop-down list. The options are:

- 426.130 Civil Commitment (General)
- 161.327 GEI T1 (Judge commits PSRB client directly to Mental Health Directorate (MHD) – Guilty Except for Insanity - Tier 1)
- 161.327 GEI T2 (Judge commits PSRB client directly to Mental Health Directorate (MHD) – Guilty Except for Insanity - Tier 2)
- 161.370 Court Order (Commitment for unit to proceed)
- 161.365 Court Order (Pretrial exam to determine 'fitness to proceed')
- 179.473 Corrections DOC (Department of Corrections) (Offender transferred (up to 30 days) for stabilization/evaluation, may be administratively committed up to 180 days)
- 179.473 Corrections OYA (Oregon Youth Authority) (Youth offender transferred (up to 30 days) for stabilization/evaluation, may be administratively committed up to 180 days)
- 419C.530 Juvenile PSRB
- 426.232 Hospital Hold
- 161.315 Court Order Competency Eval (Pretrial exam for insanity or extreme emotional disturbance)
- 426.275 Civil Commitment-Rev of Trial Vst (Civil recommit of a trial visit)
- 161.336 RVC T1 (PSRB revokes conditional release)
- 161.336 RVC T2 (PSRB revokes conditional release)
- 426.220 Voluntary (Voluntary admission for mental illness)
- 426.220 Voluntary by Guardian (Voluntary admission for mental illness by guardian)
- 426.220 VRP T2 (Voluntary admission for mental illness)
- 426.701 Civil Commitment PSRB (CCP) (Commitment of extremely dangerous person (PSRB))

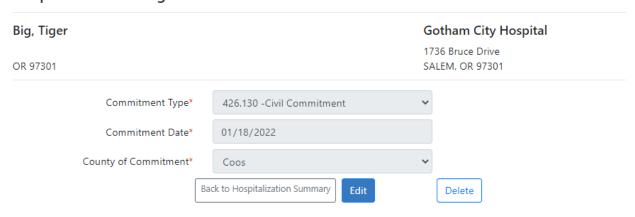
- 426.702 Civil Commitment PSRB (CCP) (Discharge of extremely dangerous person, requirements for further commitment (PSRB))
- Screening Court Ordered
- Screened Court Admitted Diversion
- Screened Not admitted
- Other
- 426.125 Civil Commitment (Conditional Release by court)(individual is committed and placed in the care of a legal guardian, relative or friend)
- 426.127 Civil Commitment (Outpatient Commitment)
- 426.273 Civil Commitment (Trial Visit)
- 426.301 Civil Commitment (Release of Commitment, Certification of continued mental illness, not protested, period of further commitment)
- 426.307 Civil Commitment (Protested continuance of commitment, Court hearing, continuance of commitment)
- 427.020 Civil Commitment (Developmental Disabilities, annual review of the plan of care for residents)
- 427.290 Civil Commitment (Developmental Disabilities)

Add the Commitment Date.

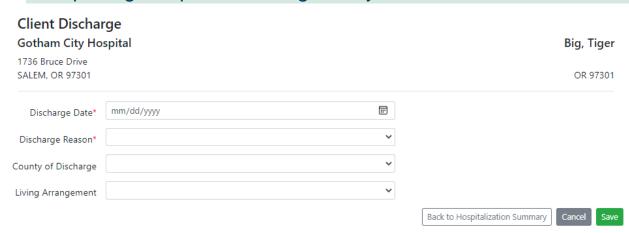
Select the County of Commitment from the drop-down menu.

Click Save.

Hospital Status Change Details



Completing Hospital Discharge Entry Form:



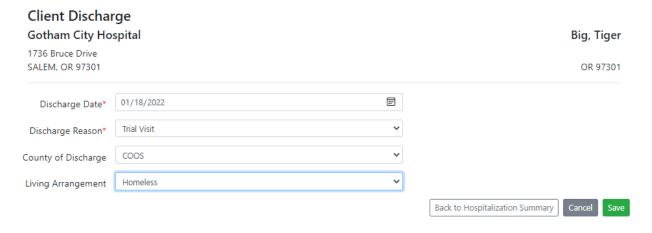
Fill out the fields: Discharge Date, Discharge Reason, County of Discharge, and Living Arrangement.

Once all the required fields have been completed click the Save button.

The system will generate the "Your Record Was Updated Successfully" message once the information has been saved.

The hospitalization number will be auto-generated.

Clicking on the Advanced options will bring up additional fields: Referred To Code and Is Competent To Drive.



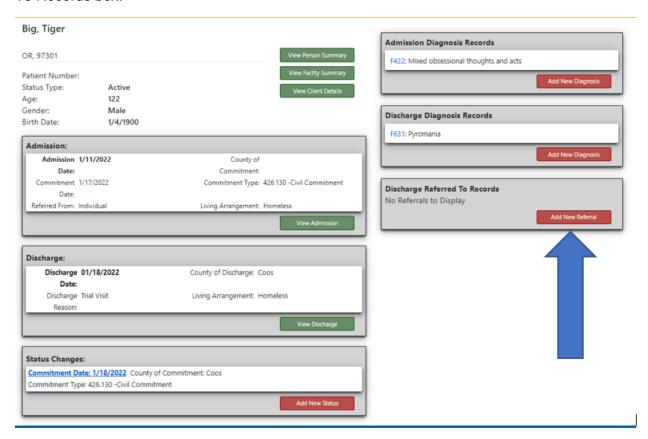
This will take you to the Discharge Diagnosis Records

Client Discharge Gotham City Hospital Big, Tiger Gender: Male DOB: 1/4/1900 1736 Bruce Drive Patient SALEM, OR 97301 , OR 97301 Number: Enrolled: 1/11/2022 Diagnosis Code ☐ Search All Primary Diagnosis* Secondary Diagnosis Informational Diagnosis Informational Diagnosis Back to Hospitalization Summary

Discharge records should always include a discharge diagnosis for the client. Diagnosis records can be added up to 90 days after the client's discharge. Multiple discharge diagnoses can be added to a hospitalization record. To add a new discharge diagnosis, select the Add Diagnosis button. Selecting this button will pull up the Hospital Discharge Diagnosis Entry Form.

Discharge Referred to Record

To add referral information to the record, click the Add Referral button in the Discharge Referred To Records box.



The Hospital Discharge Referred To Entry Form will come up.

Complete the following fields: Referred To and Referred To Date.

A Hospital Discharge number will already be auto-populated. Select the referred to option from the drop-down list.

Click the Close/Back button after saving.

On the Hospital Stay Summary page the records in the Discharge Referred To Records box will be displayed. Multiple referral records can be added to this section as needed

Reporting and Commenting

Reporting Bugs:

As ACR is a new system, there might be bugs or errors that occur. If you come across a bug or problem on a screen please take a screen shot of the issue and send it to Compass.Support@odhsoha.oregon.gov

Login Issues:

If you encounter login difficulties, please contact Compass.Support@odhsoha.oregon.gov for assistance.